



REPORTING OF THE RECORD TASK FORCE

Meeting Minutes

October 16 – 18, 2002

Administrative Office of the Courts

455 Golden Gate Avenue, San Francisco, California

TASK FORCE MEMBERS PRESENT:

Hon. James A. Ardaiz, Chair, Administrative Presiding Justice of the Court of Appeal, Fifth Appellate District
Hon. S. William Abel, Presiding Judge, Superior Court of Colusa County
Ms. Maura Baldocchi, CSR, Official Court Reporter, Superior Court of San Francisco County
Mr. Ron D. Barrow, Clerk of the Court, Court of Appeal, First Appellate District
Mr. Gary M. Cramer, CSR, Official Court Reporter, Superior Court of Los Angeles County
Hon. John S. Einhorn, Assistant Presiding Judge, Superior Court of San Diego County
Ms. Barbara J. Lane, CSR, Supervisor, Court Reporters, Superior Court of Riverside County
Mr. Len LeTellier, Executive Officer, Superior Court of Sutter County
Mr. Gary Evan McCurdy, Esq., Assistant Director, Central California Appellate Program
Ms. Jeanne Millsaps, Executive Officer, Superior Court of San Joaquin County
Mr. Gordon Park-Li, Executive Officer, Superior Court of San Francisco County
Ms. Kary Parker, CSR, Official Court Reporter, Superior Court of Orange County
Mr. Tom Pringle, CSR, Official Court Reporter, Superior Court of Shasta County
Mr. Paul J. Runyon, Administrator, Litigation Support, Superior Court of Los Angeles County

TASK FORCE MEMBERS ABSENT:

Mr. Edward J. Horowitz, Esq., Edward J. Horowitz, A Professional Corp.
Mr. Alan Slater, Chief Executive Officer, Superior Court of Orange County
Ms. Fiel D. Tigno, Esq., Supervising Deputy Attorney General, Office of the Attorney General Department of Justice

TASK FORCE LIAISON:

Ms. Julie R. Peak, CSR, Chair, Court Reporters Board of California **(Present)**

PRESENTER:

Ms. Cheryl R. Redlich, Official Reporter, Superior Court of Sacramento County

GUESTS:

None

FACILITATOR:

Ms. Sharon Maher, Maher & Company **(Present)**

AOC STAFF PRESENT:

Ms. Christine E. Patton, Regional Director, Bay Area/Northern Coastal Region
Ms. Sally Lee, Manager, Executive Office Programs Division
Ms. Claudia Ortega, Lead Staff, Court Services Analyst, Executive Office Programs Division
Ms. Emily Flynn, Attorney, Office of the General Counsel
Mr. Martin Riley, Governmental Affairs Analyst, Office of Governmental Affairs
Ms. Deborah Silva, Administrative Coordinator, Executive Office Programs Division
Ms. Josely Yangco-Fronda, Secretary II, Executive Office Programs Division

AOC STAFF ABSENT:

Ms. Pat Sweeten, Director, Executive Office Programs Division

Meeting Minutes

Wednesday, October 16, 2002

Item 1 Opening Remarks

Administrative Presiding Justice James A. Ardaiz, Chair of the Reporting of the Record Task Force, called the meeting to order at 1:04 p.m. He began the meeting by welcoming everyone to the Northern/Central Regional Office of the Administrative Office of the Courts (AOC). He explained that the objectives of this task force meeting were to further examine producer concerns, outline production of the record, and discuss transcript uniformity.

Item 2 Public Comment

No members of the public addressed the task force on this day.

Item 3 Recap of Accomplishments and Observations from Previous Meeting

Ms. Sharon Maher, facilitator to the task force, summarized the fundamental accomplishments of the previous meeting, which included the development of a working definition of the record, the determination of the task force's primary focus, and the initial identification of certified shorthand reporters' most pressing professional concerns.

Item 4 Second Draft Ground Rules

Ms. Maher summarized the existing ground rules and pointed out a suggested amendment by Justice Ardaiz to modify Item 9, "Requests for Staff Assistance", of the ground rules to read:

"If a member would like to request staff or legal assistance with a matter, he or she must first contact the lead staff. The lead staff will then convey this request to the chair. After due consideration, the chair will approve or deny this request."

The task force also discussed whether the ground rules should also apply to small group discussions.

Motion by Justice Ardaiz: That the ground rules be approved as currently amended and that they apply to small group discussions as well.

- First: Hon. S. William Abel; Second: Mr. Len LeTellier
- Passed with no opposing votes by the task force.

Item 5 Draft Minutes

Motion by Justice Ardaiz: That the draft minutes of the August 2002 meeting be adopted without amendment.

- First: Mr. Ron D. Barrow; Second: Mr. Paul J. Runyon
- Passed with no opposing votes by the task force.

Motion by Justice Ardaiz: That the draft minutes of the June 2002 meeting be adopted without amendment.

- First: Mr. Gordon Park-Li; Second: Mr. Tom Pringle
- Passed with no opposing votes by the task force.

Item 6 Report Regarding Remarks Given at the California Official Court Reporters Association (COCRA) Meeting

Justice Ardaiz reported that in his capacity as chair of the task force, he provided remarks at a meeting of the California Official Court Reporters Association (COCRA) held on September 28, 2002, in San Jose, California. Ms. Maura Baldocchi, COCRA President, invited Justice Ardaiz to address this association's membership. Justice Ardaiz explained that during the meeting he outlined the task force's charge and discussed its scope. Following his remarks, association members asked Justice Ardaiz various questions concerning potential legislation, the future direction of the task force, and the potential for input by deposition reporters.

Ms. Julie R. Peak indicated that deposition reporters had asked Justice Ardaiz whether any future statutory changes by this task force would affect deposition reporters. Justice Ardaiz explained that the task force's charge did not directly affect deposition reporters. He also stated that while the task force membership will not be altered to include deposition reporters, the task force would remain open to their direct input as well as indirect input via other task force members who are aware of their concerns and interests.

Justice Ardaiz and Ms. Baldocchi both concluded that this was a productive and informative meeting.

Item 7 Web site Correspondence to the Task Force

Justice Ardaiz reported that the public has not sent any e-mails to the task force via its Web site. He also stated that he would add a comment to the Web site to assure certified shorthand reporters that this task force will work with their profession to identify concerns, concretely address the issues, and work toward common objectives.

Item 8 Public Statement by Ms. Arnella Sims, President, Los Angeles County Court Reporters Association

Justice Ardaiz reported that in response to Ms. Arnella Sims' previous comments to the task force and the concerns raised by the task force's court reporter members, task force staff have consulted with the Center for Judicial Education and Research (CJER) staff to develop training for (1) judges on the verbatim transcript production process and the associated demands of court reporting and (2) court reporting staff on the legal mandates and procedural requirements affecting court reporting, and best practices to avoid work related injuries. CJER is the AOC division responsible for developing and maintaining a comprehensive and quality educational program for California's judicial officers and court staff at both the trial and appellate levels.

Justice Ardaiz convened a work group of task force members to provide CJER with the necessary information to begin developing this training. The work group members include: Ms. Jeanne Millsaps (to facilitate and oversee); Ms. Maura Baldocchi; Mr. Gary M. Cramer; Ms. Barbara J. Lane; Ms. Kary Parker; and Mr. Tom Pringle.

Regarding Ms. Sims' statements that the court reporting profession does not have direct input to the Judicial Council's rule making process, Justice Ardaiz stated that how and when court reporters could have improved communication is still under review.

Item 9 Producers of the Record and Their Concerns

Ms. Maher recapped the task force's previous discussion regarding the concerns of direct producers and the task force continued to develop its list of direct producers with their corresponding concerns.

Item 10 Definition of the Profession

Because the phrase "our profession" had been raised a number of times in the previous discussion, Justice Ardaiz asked the court reporter members to define this wording. The discussion then centered on the current and potential functions of certified shorthand reporters. The task force then developed an initial working definition of the court reporting profession.

Item 11 Dinner Arrangements and Shuttle Services

Ms. Claudia Ortega provided driving directions to the dinner location and the shuttle schedule for transportation to the restaurant.

Item 12 Other Business and Adjournment

With no further business, Justice Ardaiz adjourned the meeting at 4:52 p.m.

Meeting Minutes Thursday, October 17, 2002

Item 1 Recap of the Previous Day's Discussion

Justice Ardaiz called the meeting to order at 8:40 a.m. He briefly recapped the previous day's discussion by stressing the importance of understanding all perspectives as the task force proceeds to develop public policy. He stated that he felt positive about the task force's progress to date.

Item 2 Public Comment

Members of the public did not address the task force on this day.

Item 3 Producers of the Record and Their Concerns (Continued)

The task force continued its identification of the direct producers of the record and their corresponding professional concerns. At the conclusion of the discussion, the task force acknowledged that it must first address the concerns of the producers to effectively address the concerns of the users.

Item 4 Demonstration of Stenographic Reporting with Question and Answer Session

Ms. Cheryl R. Redlich, Official Court Reporter, Superior Court of Sacramento County, made a presentation to the task force concerning the major daily responsibilities of an official court reporter. She followed this presentation with a demonstration of realtime reporting.

Item 5 Components of Record Production

Task force members began to develop a working list of the key components of record production.

Item 6 Additional Amendment to the Ground Rules

Some task force members requested Item 6, “Dress Code”, of the ground rules be amended to allow for more casual attire during Friday meetings. Justice Ardaiz and the task force agreed that the ground rules would be modified to reflect this change.

Item 7 Changes to Record Production

Task force members began to develop a working list of the significant changes to record production over time.

Item 8 What Drives Change in Record Production?

Task force members began to develop a working list of the major catalysts to change in record production. The task force also discussed the extent to which the producers manage change and users drive change.

Item 9 Adjournment

With no further business, Justice Ardaiz adjourned the meeting at approximately 5:30 p.m.

Meeting Minutes Friday, October 18, 2002

Item 1 Recap of the Previous Day’s Discussion

Justice Ardaiz called the meeting to order at 8:30 a.m. and reflected on the previous day’s discussion.

Item 2 Public Comment

Members of the public did not address the task force on this day.

Item 3 Transcript Uniformity

The task force began its first discussion regarding the concept of transcript uniformity. The group developed a working list of reasons why transcripts should be uniform statewide, the elements of a transcript that may be standardized, and the numerous other issues to address in creating a uniform transcript.

Item 4 Accomplishments of the Task Force to Date and Future Course of Action

Justice Ardaiz thanked the task force members for their high degree of participation and commitment to the work of the task force. He informed them that the task force staff would be contacting various entities to begin compiling data concerning the California court reporting profession's demographics and the shortage. The information will be shared with the task force.

Item 5 Adjournment

With no further business, Justice Ardaiz adjourned the meeting at 11:55 a.m.